

Bismillah
Vision 2030



CopyFinancial

"An AI-powered SaaS platform for auto-trading and risk management, bridging retail, HNW, and institutional in intelligently optimizing digital assets."



<https://www.memberforex.com/>



<https://www.copy.financial/>



<https://www.advisor.ventures/>



Founder & CEO

Fuad S – RM Fuad Salim



<https://www.linkedin.com/in/fsraden/>



advisorwealth99@gmail.com

Active Social volunteers, Board advisor 3 brokerage financial, Ex-banker 2009, Financial advisor , Private equity firms, with 13+ years of experience in the financial markets



Fuad S

<https://www.memberforex.com/>

Since 2015, I have been building MemberForex.com— service developer a trading tool for morethan 1,000+ traders & manager broker

[PROFILE ON LINKEDIN](#)



Fuad S

<https://www.copy.financial/>

Now, through Copy.Financial, we are bringing a revolution in trading automation with AI, helping retail and all segment level to optimize their asset & strategies without the risk of human

[PROFILE ON LINKEDIN](#)



Fuad S

<https://www.advisor.ventures/>

Soon start-up incubator, accelerator (investor of startups), providing seed funding, mentorship, and opportunities

[PROFILE ON LINKEDIN](#)



www.linkedin.com/in/fsraden/

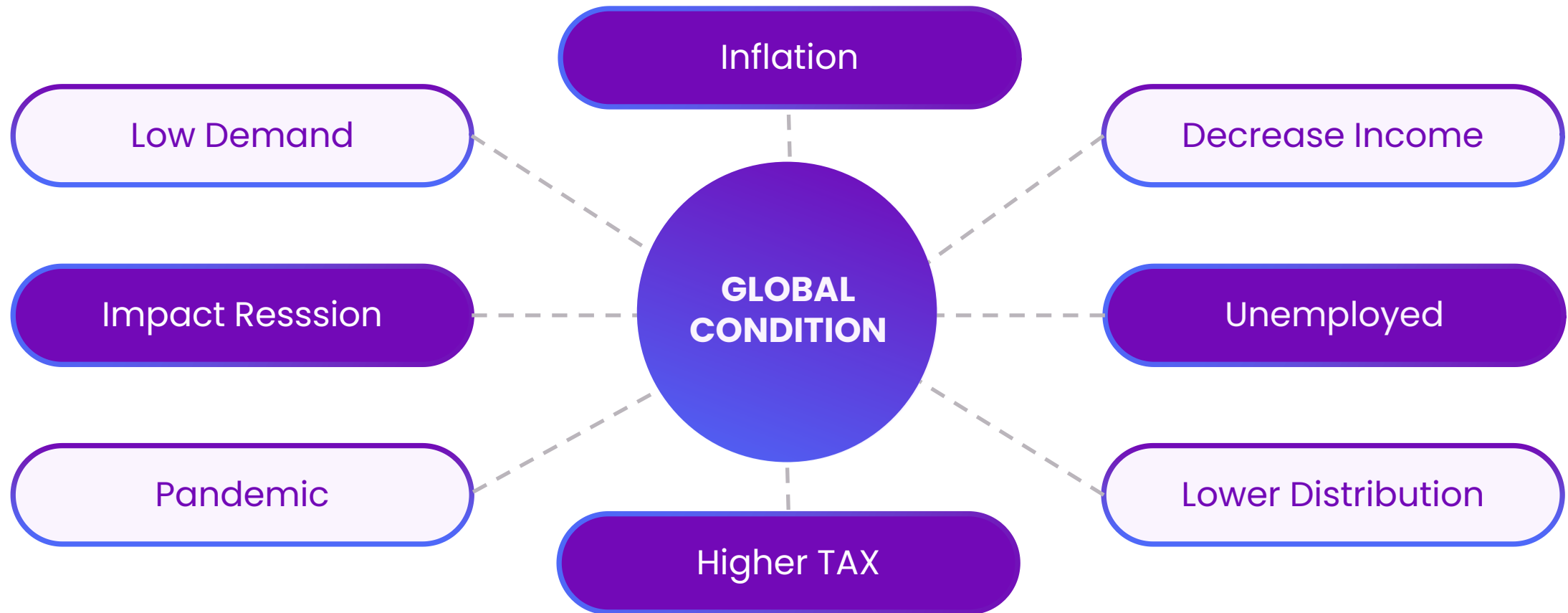


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PROBLEMS GLOBAL

Globally incubate standards compliant channels before scalable benefits.



We Found The Problems – Why Now

1. General public lack & difficulty to have affordable risk managing tools, lack of discipline and Emotions (overtrading, FOMO).
2. Need an easily accessible automation solution, without full human control, without emotion and discipline
3. The industry needs a scalable SaaS solution—just as the fx, CFD, Metal, Commodity, crypto and retail trading markets are booming.

75%

No Financial Planning & Poor Education

75% of millennials and Gen Z lack access to affordable financial planning & poor education.

65%

Undefined Market

High fees (1-2% AUM) and complexity deter new investors.

80%

Global Resession Global

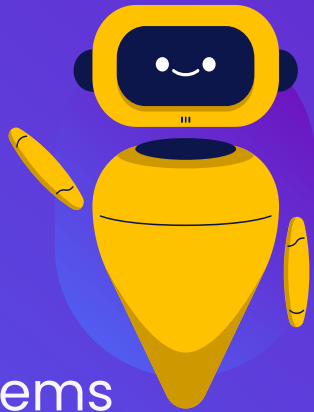
2% - 5% inflation per year in the long term, it is important to prepare before and after it occurs

35%

Low Distribution

The number of consumers & sales value can decrease, affecting business revenue and profitability.

Solution



How to Solve The Problems

1. Copy.Financial as an AI-based SaaS platform for auto-trading and auto risk management, full Ai Driven 24/7 hours
2. Copy.Financial as a digital economic platform, bridge for all level segments between retail Segment, Family Office/VC/LP /Company & Corporate Segment and HNW Segment
3. Copy.Financial Software platform trading and exchange crypto



Automated Copy

Investment strategies run automatically without humans, Replicate to professional strategies.



All Level Users Segment

With investment options – accessible to all segment user



Free Education Asistant

Dynamic Risk Management & User-friendly guide to investment choices



Low Cost & Flat Subscription

Low Cost & Flat subscription fee model instead of AUM-based fees.



A/B Beta Testing

Beta trial available for users to add another portfolio



Easy Data Report

Access Monitor Via App Mobile Android IOS, Desktop PC

Advantages - Unique Combination



An AI-powered platform that provides automated trading, risk management, and digital asset optimization solutions for all market segments, namely : Retail Segment, VC/LP / Startup Company & Corporate Company Segment, HNW Segment. 4 Key service provide CopyFinancial :

1. Auto-Trading & Smart Strategy: Automate trading processes with AI algorithms to maximize asset returns (fx, CFD, Metal. Commodity, crypto and others).
2. Integrated Risk Management: AI predictive analytics to minimize market risk exposure.
3. Digital Economy Bridge: Connecting retail, HNW, and institutions in a socially-based collaborative ecosystem.
4. Portfolio Optimization: Advanced tools to efficiently manage and balance digital assets.

With a focus on the future of finance, CopyFinancial combines artificial intelligence, market accessibility, and security to empower users at all levels.

Conclusion : Product Service - The platform offers auto-trading and smart strategy, integrated risk management, a digital economy bridge, and portfolio optimization.

"CopyFinancial is an AI-powered SaaS platform for auto-trading and risk management, bridging for all market segment level to intelligently optimize digital assets."

4 Key Services Provide



Auto-Trading & Smart Strategy



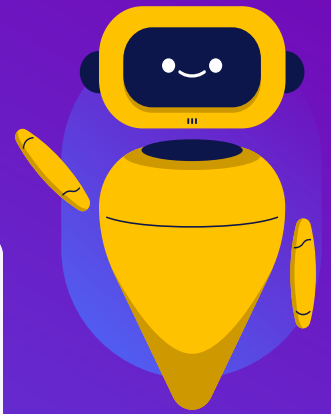
Integrated Risk Management



Digital Economy Bridge



Portfolio Optimization



WHY COPYFINANCIAL DIFFERENT

**How We Turn
\$100.000 into \$2.000.000 more**

For 2 Year

**No Costumer, No Promotion
DIGITAL ASSET LONG LIFE**

Full AI Driving Working 24/7 Hours With No Human Intervention

- Portofolio <https://copy.financial/portofolio/>
- Youtube https://youtu.be/qj2Wb_iUIEU



While we are with or without costumer, we still produce revenue self above 30% average per year

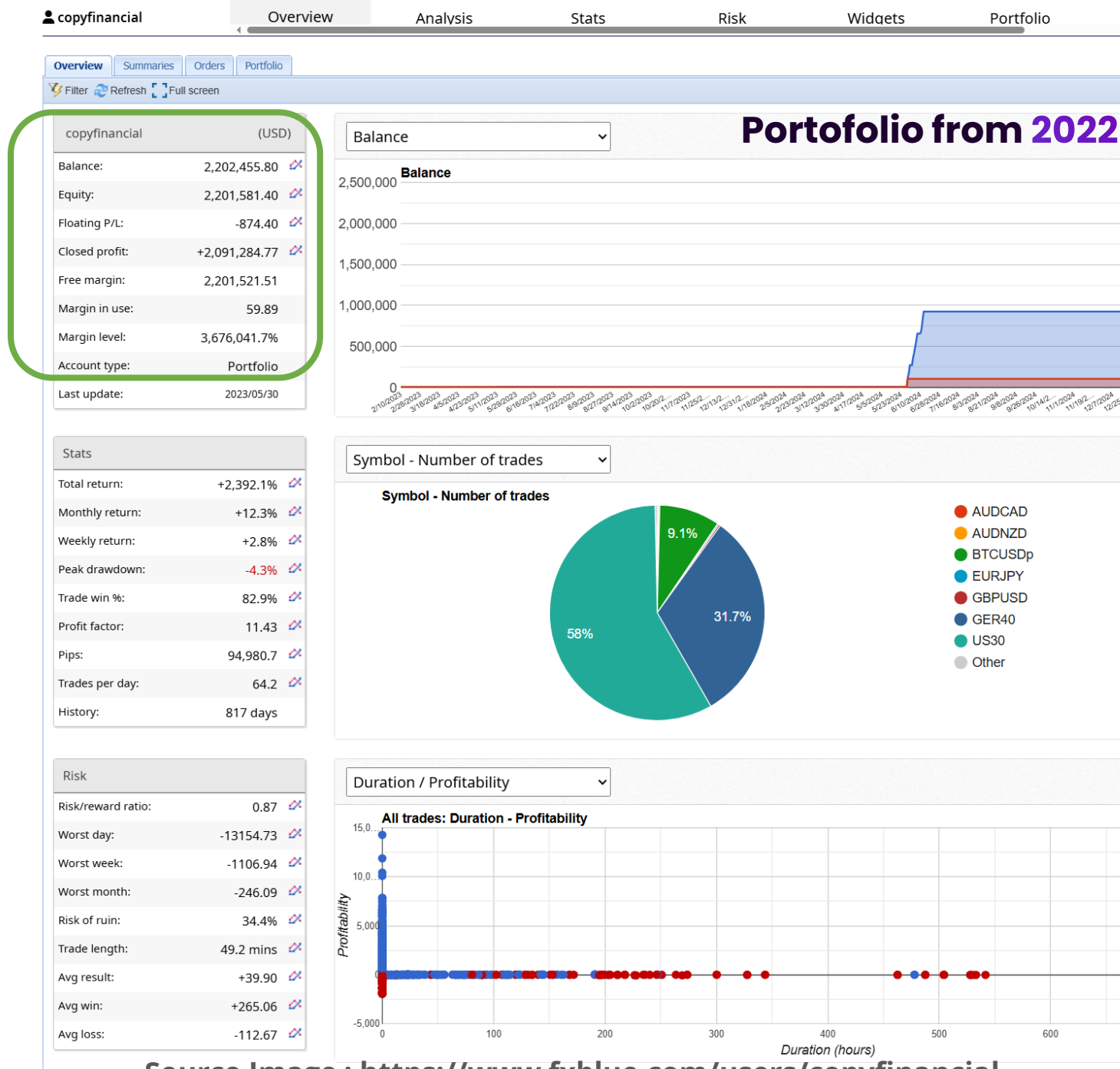
Did You Think and analyzed this : soon or late, many startup & companies will fall and bankrups in 2027 - 2030

The baby boomer momentum is happening and competition is present in all Ai services emerging like selling hot fried peanuts, at its peak there will be Free Ai which will cause many services and companies to collapse and slowly go bankrupt without any more users who will want to pay, people will move to free services

OUR PORTFOLIO AUM
No Costumer, No Promotion
<https://copy.financial/portofolio/>

**WHAT
WE'LL
BRING
TODAY**

***"Together Need
Performance, Speed,
execution and
Acceleration"***



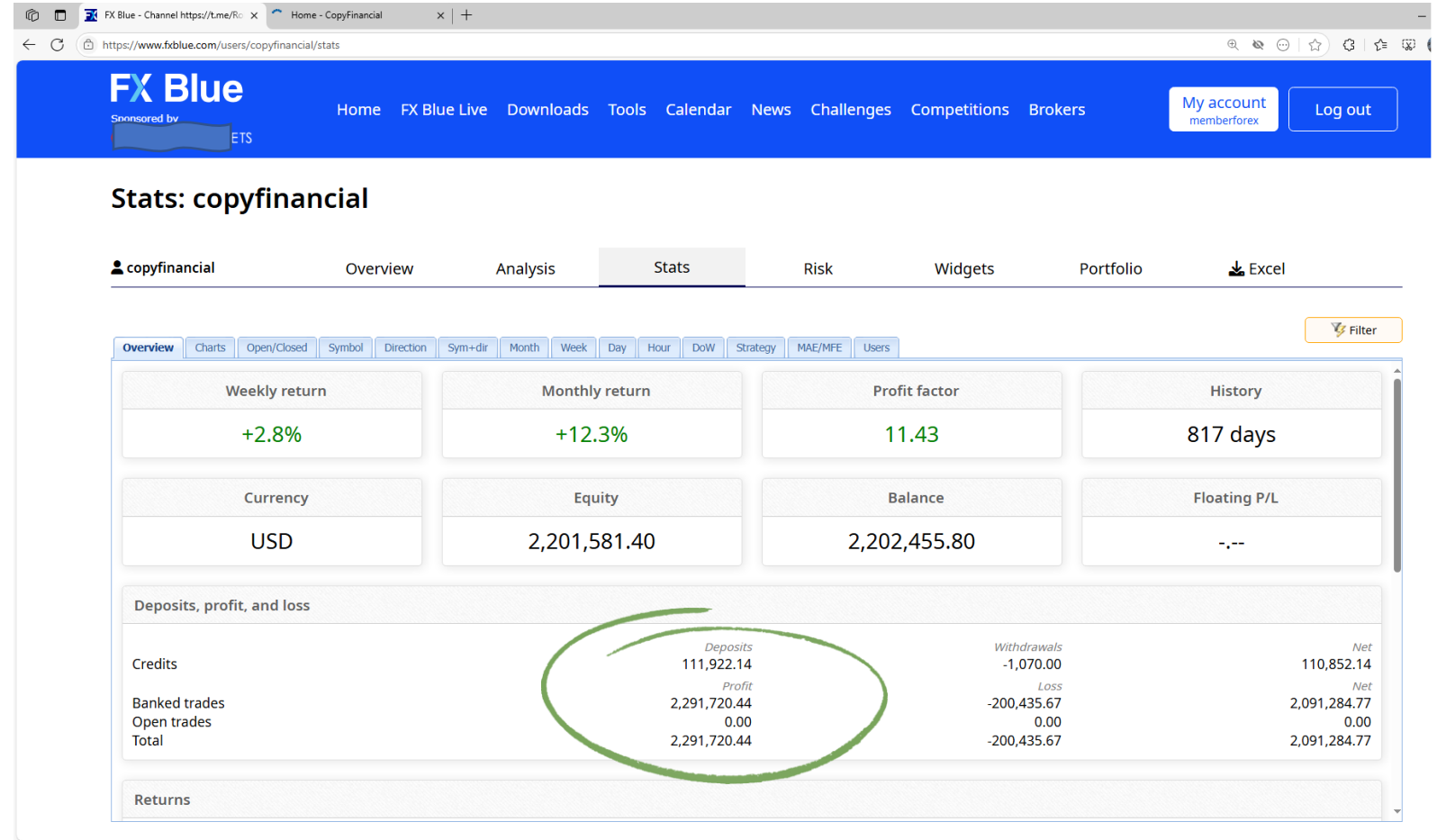
OUR PORTFOLIO AUM
No Costumer, No Promotion
<https://copy.financial/portfolio/>

**WHAT
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***"Together Need
Performance, Speed,
execution and
Acceleration"***

How We Turn \$100.000 into \$2.000.000 more for 2 year

Stats from 2022



Business Plan

RETAIL

\$200-\$100k

Retail
Segment

CORPORATE

\$ 100K & Up

Family Office/VC/LP,
Company & Corporate
Segment

HNW

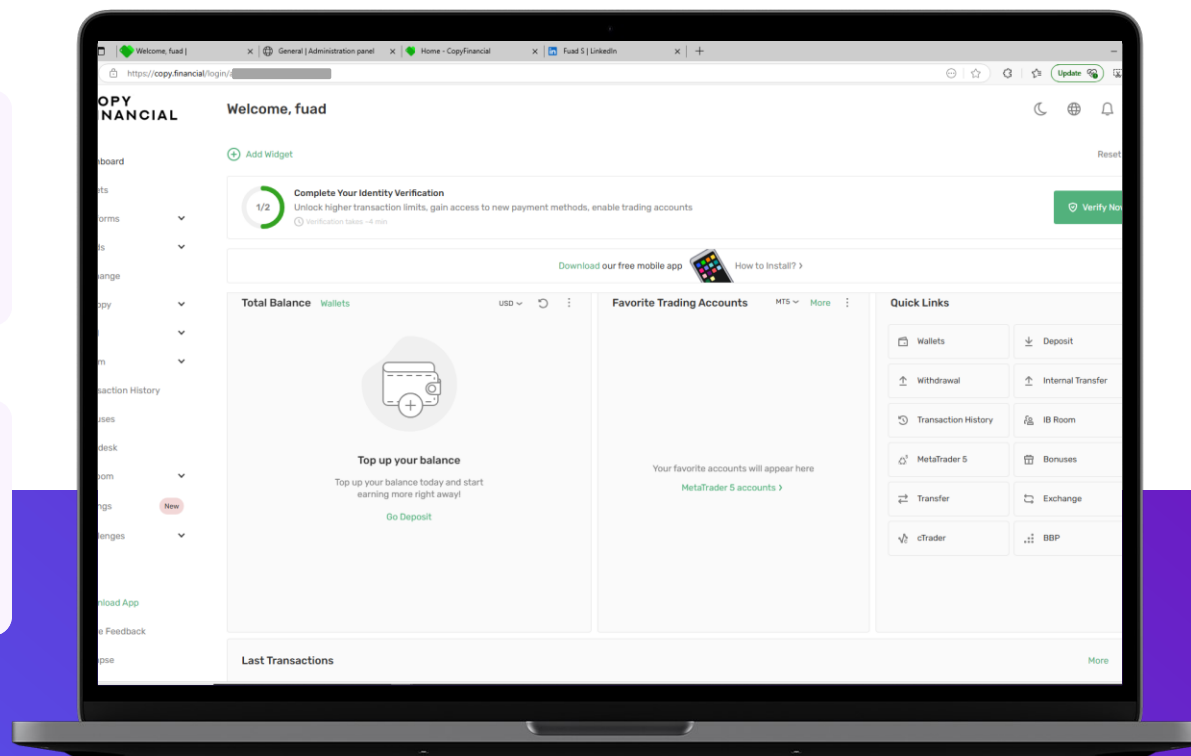
\$ 100K & Up

HNW
Segment

VIEW PROTOTYPE DESKTOP DESIGN

✓ All Level Users Segment

✓ User Friendly View
Access Monitor Via App
Mobile Android IOS,
Desktop PC



✓ Channels streamline
and full education
financial

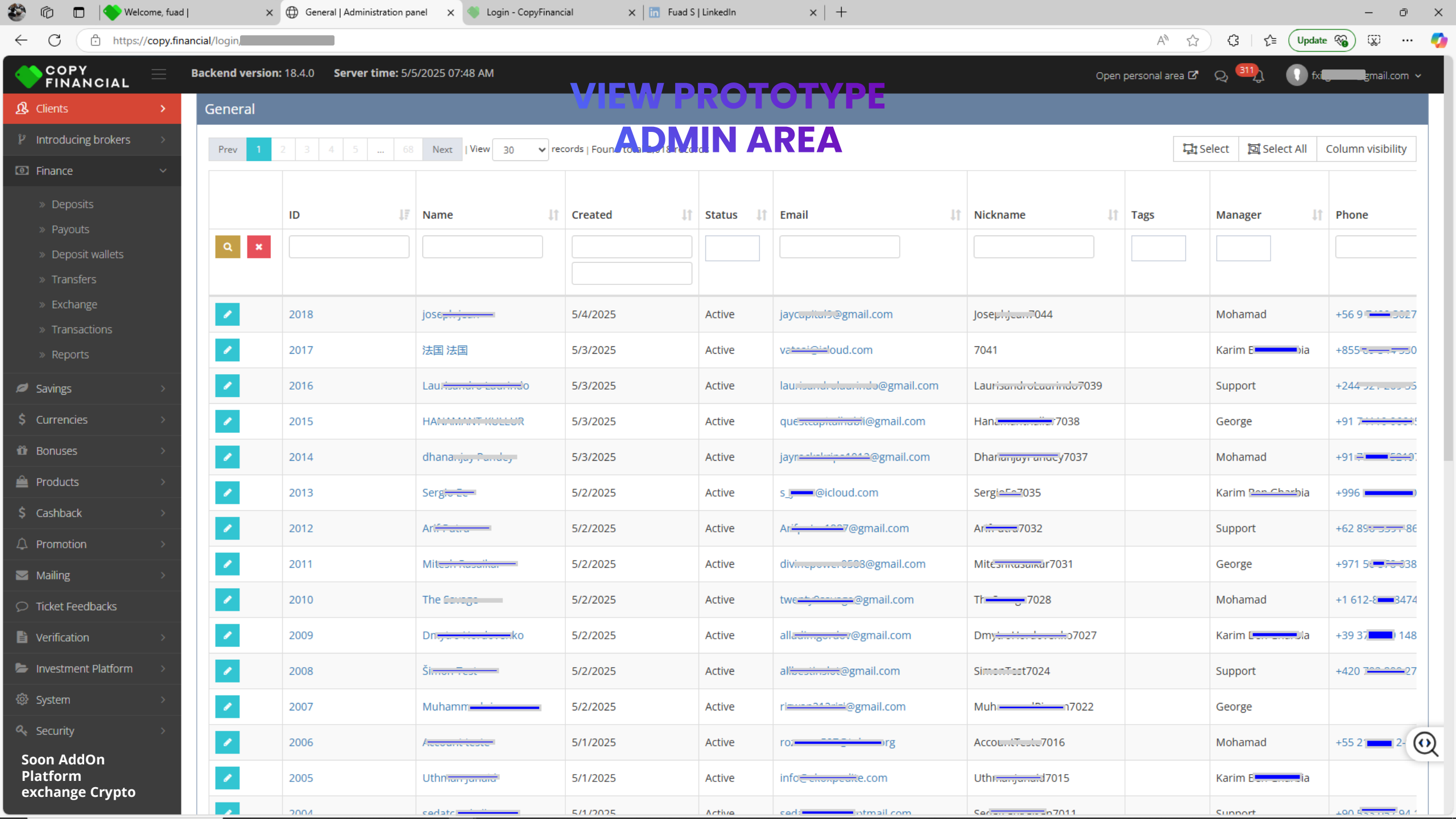
✓ Beta trial available for users
to add another portfolio

- ✓ PORTAL CLIENTS :
Refferal / CPA Affiliate,
Finance, Currency,
Bonussess, Product,
Promotion, Mailing, etc
- ✓ Security :
Document, Mail, SMS,
Two-Factor Authentication
(2FA), IP address,

Business model canvas product management validation conversion.

Strategy accelerator alpha branding business-to-consumer.

- ✓ PORTAL ADMINISTRATOR :
Refferal / CPA Affiliate, Finance,
Currency, Bonussess, Product,
Promotion, Mailing, etc
- ✓ Whitelabel & portal Market
Watch From Dealer Banker etc,
Soon AddOn Platform
exchange Crypto



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Traction Highlights



1. Proven Traction: Community of morethan 1,000+ paying users from previous products.

- "X active users, \$Y volume copied"
- "Z% retention rate, A courses sold"

2. AI-Driven: Adaptive to market changes.

3. Daily Trading Volume

- FX & CFD Brokers: ~\$300–500B
 - Crypto Exchanges: ~\$80–150B
- FX/CFD brokers still lead in volume, driven by leverage and tighter spreads.

4. Revenue per User

- FX/CFD: \$800–\$2,000
 - Crypto: \$100–\$500
- Retail brokers monetize fewer users at a higher ARPU.



5. All-in-One:

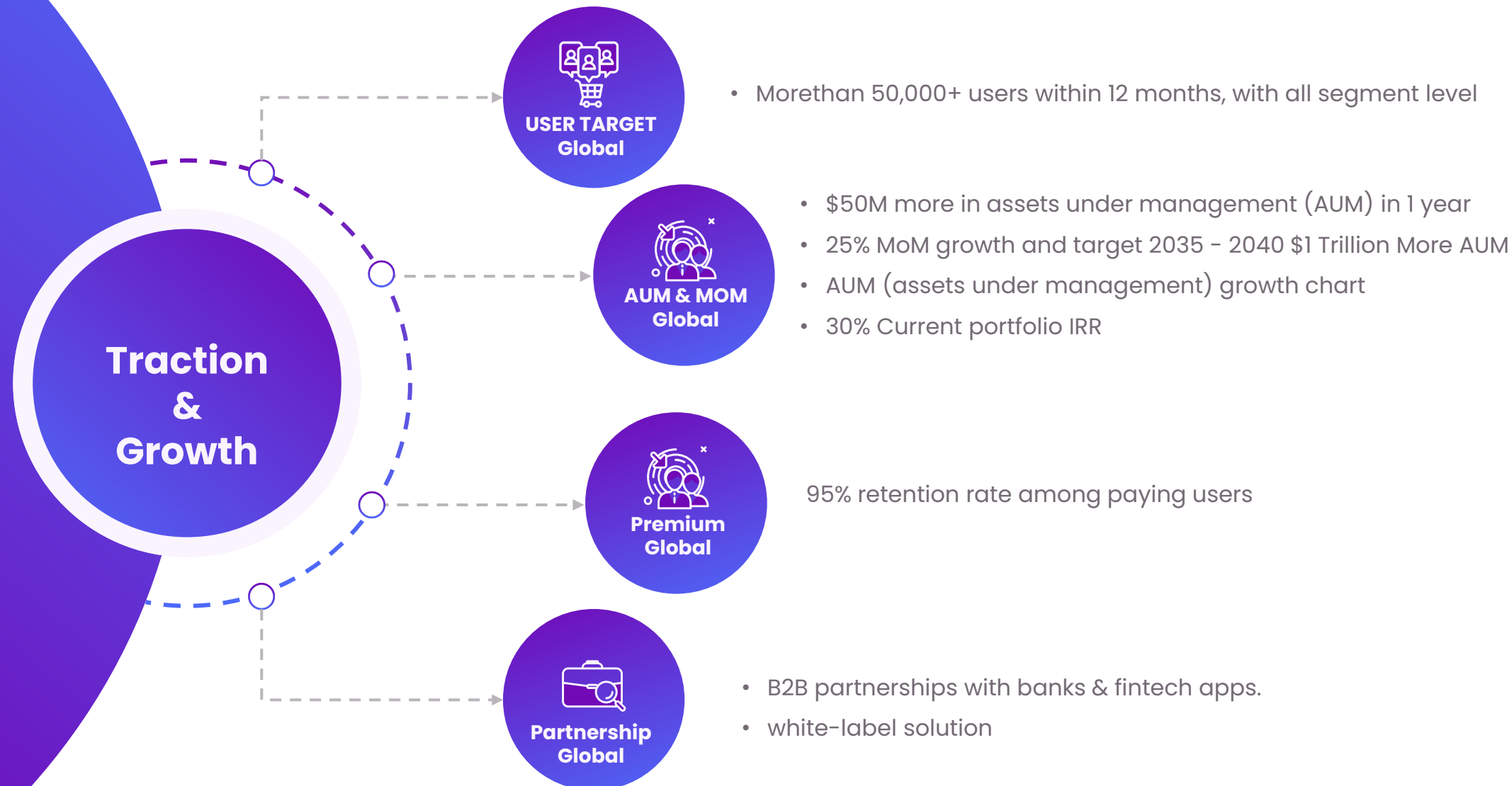
- Copy trading + risk management + white-label solution

6. Growth & Demographics

→ Fx, Crypto is growing faster, especially among Gen Z and mobile-first traders.

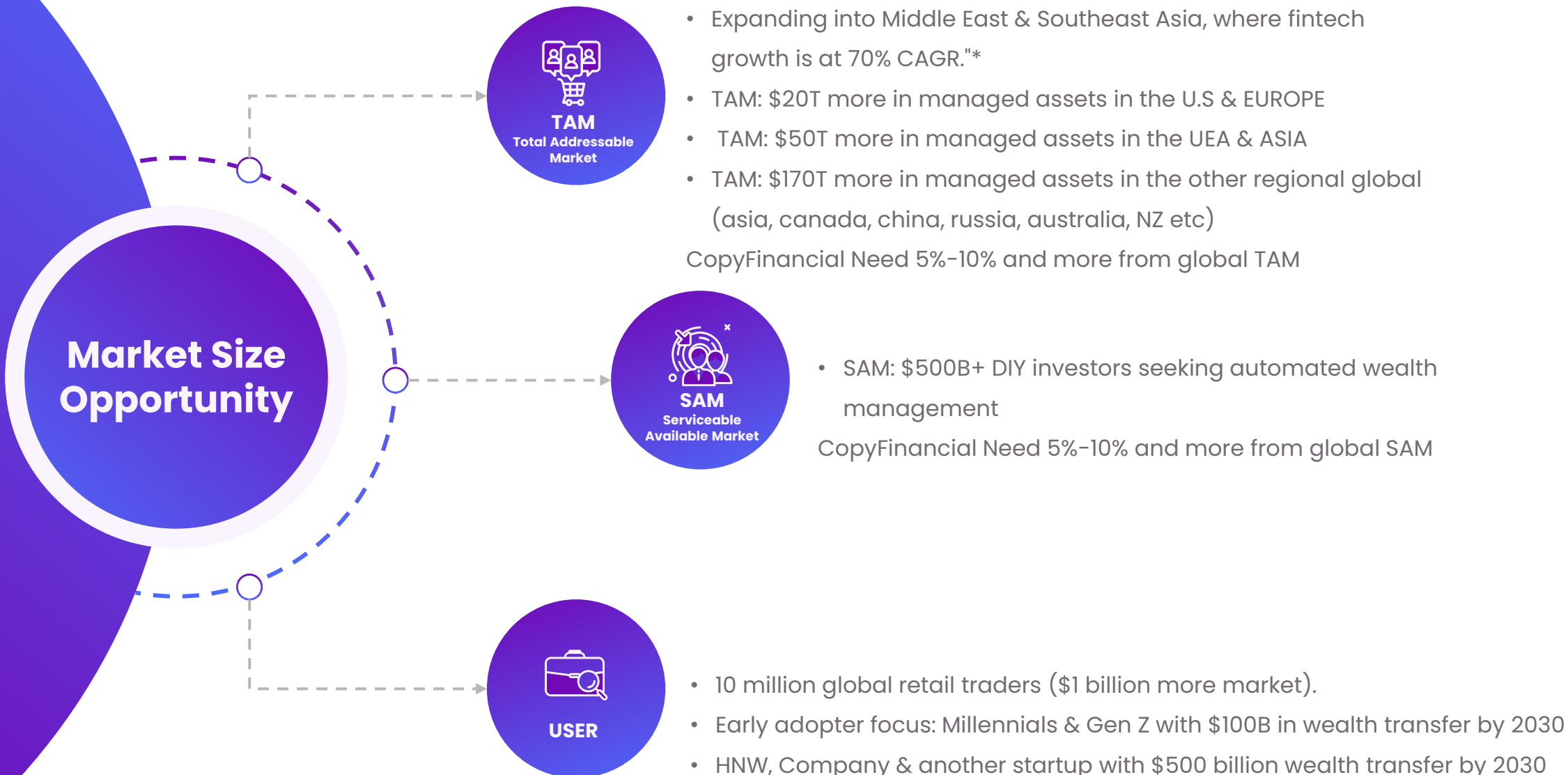


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"The global retail user market potential in particular"

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Statistic Data High Investor Demand

Rank Potential Sector

No.	Sector Competitor	H1 2019	H2 2019	H1 2020	H2 2020	H1 2021	H2 2021	H1 2022
1	Fintech 	\$5.8B	\$5.9B	\$4.4B	\$5.1B	\$14.2B	\$13.4B	\$15.6B
2	Enterprise Software	\$2.9B	\$2.2B	\$2.9B	\$3.1B	\$7.9B	\$6.5B	\$11.5B
3	Health	\$3.0B	\$4.2B	\$4.3B	\$4.9B	\$10.1B	\$6.8B	\$5.9B
4	Energy	\$2.2B	\$0.7B	\$1.5B	\$2.1B	\$4.6B	\$4.9B	\$5.8B
5	Transportation	\$1.5B	\$2.7B	\$1.6B	\$2.9B	\$6.1B	\$4.9B	\$5.7B
6	Food	\$1.9B	\$1.3B	\$1.2B	\$2.1B	\$4.0B	\$5.6B	\$3.1B
7	Marketing	\$1.3B	\$1.2B	\$1.0B	\$1.4B	\$2.7B	\$3.5B	\$2.5B
8	Real Estate	\$1.0B	\$0.5B	\$0.5B	\$1.0B	\$1.0B	\$1.4B	\$1.8B
9	Jobs Recruitment	\$0.4B	\$0.5B	\$0.3B	\$0.1B	\$1.0B	\$1.5B	\$1.7B
10	Robotics	\$0.2B	\$0.5B	\$0.3B	\$0.4B	\$1.5B	\$0.9B	\$0.9B
11	Security	\$0.6B	\$0.6B	\$0.5B	\$0.5B	\$1.6B	\$0.9B	\$1.6B
12	Education	\$0.4B	\$0.4B	\$0.2B	\$0.7B	\$1.4B	\$1.0B	\$1.3B

Market Opportunity MARKET SIZE

Globally incubate standards
compliant channels before
scalable benefits.



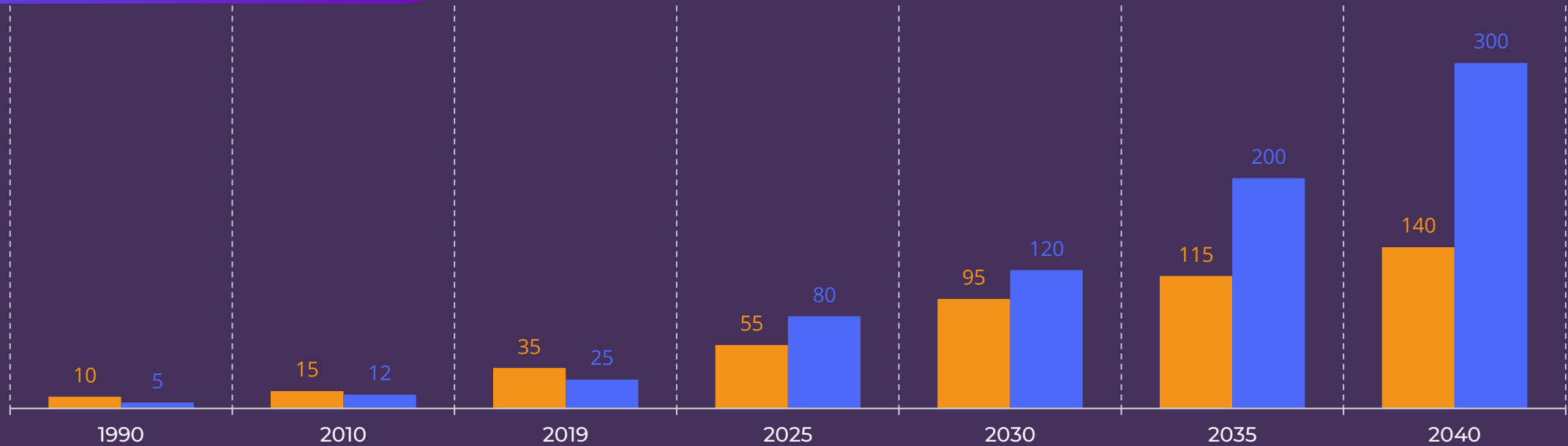
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↑ **45%** Mobile Market
Increase

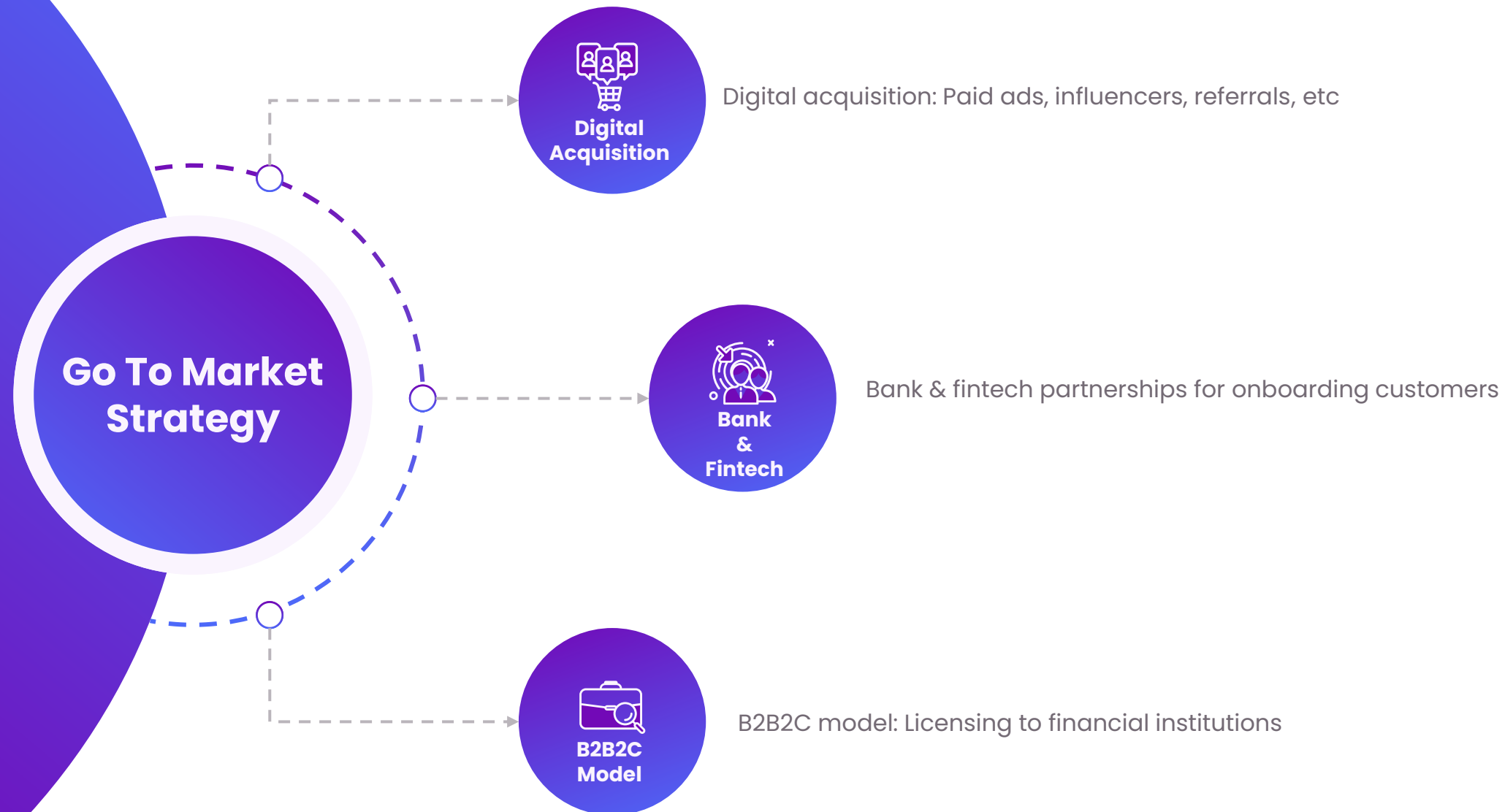
Focusing solely on the bottom line.

↑ **70%** Digital Asset
Increase

increasing number of users and digital
asset funds



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Competition

B i s m i l l a h

No	Competitor	User	Fees Cost	Personalization	Mobile UX	Ai-Driven	User Friendly
1	Traditional Advisors - 1990 below Mutual Fund and its kind	Medium Segment	Medium	Low	No	No	No
2	Wealth Management, Financial Advisor - 2010 below ETF, Broker / Stock Trading, Private Equity and its kind	High Segment	High	Medium	No	Limited	No
3	 COPY FINANCIAL	All Segment	LOW	HIGH	YES	YES	YES

Noted :

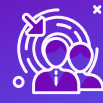
- **User** : client, = user = segment : Retail Segment, VC/LP / Startup Company & Corporate Company Segment, HNW Segment
- **Fees Cost** : commission incentive, a fee charged for certain services
- **Personalization** : client data detail report properties
- **Mobile UX** (User Experience) is a design process that focuses on the user experience when interacting with an application or website on a mobile device. The main goal of Mobile UX is to create an intuitive, responsive, and easy-to-use interface so that users feel comfortable and satisfied.
- **AI-Driven** : is a term that refers to systems, processes, or technologies that are powered and directed by artificial intelligence (AI). In the context of business and technology, "AI-driven" means decisions or actions taken based on data analysis performed by AI algorithms.

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Business Model Revenue Streams


Subscription

- Subscription-based: Free Beta / Trial
- Subscription-Premium: \$10/month or \$99/year
- Fee Sharing / Performance Fees Per User id account (10–30% benefits)
- Revenue Per Costumer
- Commision Trading Per User id account (not per costumer)
1 costumer = 1 email, can make morethan 1 user id account, max 10 user id account
- B2B – number of letters of interest or qualified
- B2C – number of waiting list signups renewals


**B2B
Partnerships**

- B2B partnerships: White-labeling platform for banks
- Whitelabel Licence (\$5–15K/Year per licence)
- Rent VPS \$15 montly / \$150 yearly, Product Item
- Premium Member (HNW, LP etc)
 \$100–\$200 montly / \$1,2k–\$2,4k peryear
- Annual meeting celebration \$500 – \$1k


**Future
Revenue**

- Equity Stake
- Future revenue: Knowledge, Leverage, and financial products

B i s m i l l a h

**ASK
Seeking
\$5M-\$10M
As Lead Investor**



- To Scale, Product Development Technonology, Customer acquisition, marketing, Operations/Inventory, Hiring key team executives, Regulatory and compliance, synergies



- 2026-2027 Expand into Middle East, SE Asia markets
- 2030 Have Been Expand Global

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Fundraising & Use of Funds



30%: Equity assets



30%: Product development (CRM, integrations, technology system)



20%: Customer acquisition, marketing,
Operations/Inventory



10%: Hiring key team executives



10%: Regulatory & compliance

Capital structure including all equity ownership in percentages



Currently, our ownership structure is:

- Founders: 80% (50% Founder & 10% Program Volunteer education school, and volunteer parents who are physically unable & building facilities and religious worship programs - permontly)
- Angel Investors: 10% (\$500K investment in 2023)
- ESOP Pool: 10%



With funding at a valuation morethan \$50M, we are proposing a 20% dilution for main investors. The post-funding structure will be:

- Founders: 64% (38% Founder & 10% Program Volunteer education school, and volunteer parents who are physically unable & building facilities and religious worship programs - permontly)
- Angels: 8%
- ESOP: 8%
- Main Investors: 20% (**you – Lead investor**)



Take Auction / Acquisition Our Holding Group

3 Group MVP Project Asset

(<https://www.copy.financial/>, <https://www.memberforex.com/>, <https://advisor.ventures/>)

- Founders: 50% (50% Founder & 10% Program Volunteer education school, and volunteer parents who are physically unable & building facilities and religious worship programs - permontly)
- Angels: 10%
- Co-Founders: 40% (**New Acquisition – you – Lead investor**)

Note : We are open to adjusting the ESOP or other terms based on further discussions."*

Financial Projection

1. Revenue Projection

We project revenue growth as follows:

- **2024:** \$1.2 million (from SaaS subscriptions + transaction fees)
- **2025:** \$5 million (institutional expansion)
- **2026:** \$15 million (going global)

Assuming:

- 40% CAGR (annual growth) based on current traction.
- Addition of 2 enterprise clients per quarter.

2. Expense Projection

Our main expenses:

- **R&D (40% of revenue):** AI & new feature development.
- **Marketing (30%):** User acquisition via digital ads & partnerships.
- **Operations (20%):** Team, cloud services, compliance.
- **Others (10%):** Legal, licensing.

3. Profitability Timeline

We are targeting breakeven in 2025 and positive EBITDA of 20% in 2026 after achieving economies of scale.

4. Cash Flow & Runway

With \$5M- \$10M in funding, our runway will be up to 18 months. If revenue grows as projected, we won't need additional funding until 2025.

6 Year Projection (2023-2028)

No	Metric	2023	2024	2025	2026	2027	2028
1	Revenue	\$1.2M	\$10M	\$45M	\$120M	\$250M	\$375M
2	Gross Margin	\$0.78M (65%)	\$7M (70%)	\$33.75 (75%)	\$96M (80%)	\$205 (82%)	\$318.75 (85%)
3	Opex (as % of Revenue)	\$1.14 (95%)	\$7.5 (75%)	\$24.75 (55%)	\$54M (45%)	\$95 (38%)	\$131.25 (35%)
4	EBITDA	-\$0.36M	-\$0.5M	\$9M	\$42M	\$110M	\$187.5M
5	EBITDA Margin	-30%	-5%	20% ▲▲	35% ▲▲▲	44% ▲▲▲▲	50% ▲▲▲▲▲
6	User / Client (1 user can open multiple morethan 1 account in 1 portal)	10000	25000	100000	250000	500000	750000
7	Burn Rate	\$108.000	\$109.000	\$40K (update may)	\$110.000	\$130.000	\$150.000

Noted :

- **Revenue** : Enterprise Value/Revenue
- **EBITDA** : Earnings before Interest, Tax, Depreciation and Amoritization
- **Opex** : Operating Expenses
- **Burn Rate** : Burn rate is the rate at which a startup spends capital over a given period—usually per month—to finance operations before generating positive cash flow from its business activities. This number helps startups understand how quickly capital is being burned, when they need to seek additional funding, and how healthy their financial condition is.

Financial Data
& project

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TODAY**

***"Together Need
Performance, Speed,
execution and
Acceleration"***



Financial Data of Valuation & Portfolio

Projected ROI: morethan 5x in 3 years

- CashFlow Valuation Model 2025

<https://copy.financial/Cash-Flow-Valuation-Financial-CopyFinancial-Model-2025.pdf>

- Premoney Valuation

<https://copy.financial/Premoney%20Valuation%20CopyFinancial%205%20Year.htm>

- Valution IRR, EBITDA Model 2024

<https://copy.financial/Valuation%20EBITDA%20IRR%20CopyFinancial%205%20Year.htm>

- Breakevent

<https://copy.financial/Breakevent%20Timeline%20CopyFinancial%205%20Year.htm>

- Portfolio AUM

<https://copy.financial/portfolio/>



<https://www.copy.financial/>

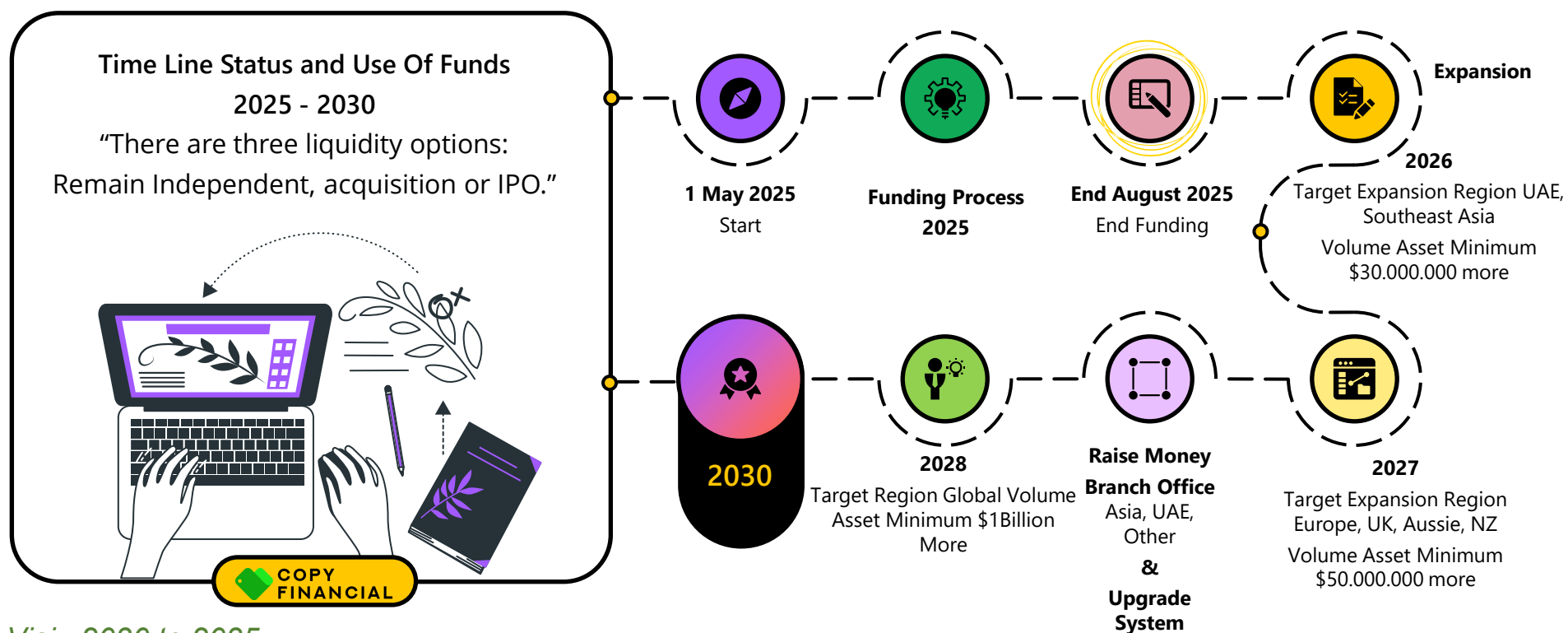


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Milestone



Visi : 2030 to 2035

The Best Digital Economic Unicorn in the Middle East and Southeast Asia region,
insyaallah

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Building Vision & Target 10 – 15 year

"Dreams give direction, visions give meaning, and goals make action happen—without all three, a startup is just an idea without a purpose." 🚀



7 – 15 Year UniCore Asia & Middle East



5 – 6 Year Remain Independent/Acquisition/IPO



2 – 5 Year Expand Global



**1 – 2 Year Build Regional
UAE, ASIA, EUROPE**



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*"Together Need Performance,
Speed, execution and
Acceleration"*

Fuad, S
– RM Fuad Salim –

Contact To Action

"Dreams give direction, visions give meaning, and goals make action happen—without all three, a startup is just an idea without a purpose." 🚀

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MVP:

- www.memberforex.com 2015
- www.advisor.ventures (soon)

Find Us



Bismillah

Founder Activity - Building Grand Mosque and school facilities
for underprivileged children of Islamic boarding school students
in rural villages, Lembang area, Bandung

Our Program
Volunteer



B i s m i l l a h
V i s i o n 2 0 3 0



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Present and Provide Sustainable and Long-term Solutions
For you as an angel investor, Contact Us on how to partner, to become part of our main LP investors



Email Founder@copy.financial



<https://www.memberforex.com/>



<https://www.copy.financial/>



Soon progress

<https://www.advisor.ventures/>